KAIROS PROJECT GROUP, INC.

Website
kpgnc.com

Industry Vertical
MEP Engineering

TrebleHook™

Customer Spotlight: Kairos Project Group

About Kairos Project Group

Kairos Project Group is no ordinary MEP engineering firm. Specializing in Commercial, Industrial, Healthcare, Manufacturing, Mission-critical, and Science/Tech projects, they're a go-to partner for clients across the Southeast—and sometimes beyond. Based in Raleigh and Charlotte, Kairos Project Group brings technical excellence and trusted partnerships to the table.

We sat down with Kelsey Jones, their Director of Business Development, who stepped into the role two years ago with a mission: bring structure and strategy to an already stellar engineering team. "Before TrebleHook, we were kind of flying blind on the business development side," she admitted. "Our engineers were streamlined for production, but we had no clear system to track project leads, follow up on proposals, or see what marketing efforts were actually moving the needle."

Why TrebleHook

Kelsey knew a CRM system was non-negotiable. But not just any CRM- it had to work for how AEC firms operate. "I've used Salesforce before, and I knew it was intuitive, especially on the go," she said. "But TrebleHook felt like Salesforce with a hard hat on. It's built for project pursuits, not product sales. That's a huge difference in our world." And the timing couldn't have been better. When she joined, there wasn't even a spreadsheet in place for business development. TrebleHook quickly became their foundation.

What Changed

Two years later, things look a whole lot different. Kairos Project Group now runs like a well-oiled machine on the front end of the business, and TrebleHook is at the heart of it.

Here are a few of their favorite things:

- On-the-go access that keeps Kelsey connected while out networking
- Team-wide visibility that bridges the gap between BD, engineering, and marketing
- Smarter marketing spend thanks to ROI tracking tied to events and sponsorships
- Automatic handoffs that notify operations as soon as a deal closes
- Leadership dashboards that keep execs informed without having to dig
- Email sync with Outlook so project convos never get lost

"We're not just using it to manage our pipeline," said Kelsey. "It's an integral piece to how we run the business now."

What's Next

Kairos Project Group is just getting started. They're exploring integrations with PandaDoc to streamline proposals, and QuickBooks Online to tie project data into their financials. As their processes get sharper, the platform is only becoming more powerful. "It's exciting to see how we can keep layering in value as we grow."

Kelsey's Advice to the AEC World

"I've already told several colleagues in BD about TrebleHook," Kelsey shared. "Most of us are working with lean teams and juggling multiple priorities. Having one place to organize it all? That's a game-changer." Her advice? "If your firm is still using spreadsheets or stuck in a tool that wasn't built for AEC, it's time. TrebleHook makes your job easier, and your data exceedingly more powerful."

The Fun Stuff

Sure, it's powerful—but it's also practical. Kairos Project Group uses marketing tools to track contacts who golf or enjoy Canes games (helping them plan outings), send holiday gifts to top clients, and build stronger relationships. They also tag projects to keep their marketing efforts organized- indicating which are confidential, which have renderings or visuals, and which are approved for promotion.

"It's those extra features that make a big difference," Kelsey said.

"If your firm is still using spreadsheets or stuck in a tool that wasn't built for AEC, it's time. TrebleHook makes your job easier, and your data exceedingly more powerful."

Kelsey Jones
Director of Business Development, Kairos Project Group

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